**POLICIES FOR NEXT PARTICIPANTS**

The mission of Next is to identify and meet the needs of older adults and coordinating community resources to provide educational, recreational and social programs; supportive outreach services and volunteer opportunities.

Next was established by Next to enable Birmingham area older residents to have a specific location where they could gather on a regular basis to meet their social, recreational, educational, health and fitness needs in the company of like-minded peers.

The following “Policies for Next Participants” have been developed to insure that all participants enjoy a safe and pleasant experience while participating in programs and activities.

1. Courteous language shall be used at all time. Use of vulgar, obscene or insulting language or gestures may not be inflicted on anyone at the Next Center or its activities including members of the staff, volunteers or others utilizing the Center or its vehicles.
2. Courteous behavior shall be the norm at all times. Behavior of any type that inconveniences or interferes with the activities of members of the staff, volunteers or others utilizing the Center or its vehicles cannot be tolerated.
3. Those utilizing the Center or its vehicles shall be appropriately attired at all times and shall understand the importance of attending to their personal hygiene needs on a regular basis.
4. Physical or verbal abuse or harassment of any other form is prohibited. It may not be inflicted on members of the staff, volunteers, or others utilizing the Center or its vehicles.
5. Persons under the influence of alcohol or illegal drugs may not be present at the Center or be transported on its vehicles.
6. All persons utilizing the Center or its vehicles shall take due care of the Center’s equipment and furnishings.
7. All persons utilizing the Center shall abide by the rules and regulations set by the Next Board of Directors concerning hours of operation, areas where food and drink are prohibited and safety precautions.
8. All persons utilizing the Center shall comply with the Michigan State Law, that as a public building, the Center is a smoke free building.
9. Those interested in soliciting, distributing literature, offering items for sale, soliciting for signatures, conducting surveys, videotaping or photographing shall request authorization in advance.
10. No individual shall engage in any activity at the Center which creates or poses a danger to the individual or other persons at the Center.

11. No pets shall be allowed in the Center, with the exception of registered service animals.

12. Violations of these rules may result in (a) verbal or written reprimand; (b) temporary or permanent loss of Center privileges; or (c) such other steps deemed necessary by Next under the circumstances.

**TRANSPORTATION POLICIES FOR NEXT VAN RIDERS**

1. Service is offered to seniors 55+ and/or physically handicapped persons residing in Birmingham, Beverly Hills, Bingham Farms and Franklin.
2. Requests for transportation need to be made at least 3 days in advance. Inform us of your name, address and phone number; your destination address and phone number; appointment time and estimated length of appointment.
3. All Van riders are required to fill out a form with name, address, phone number and emergency contact information before riding the van for the first time.
4. The van runs weekdays from 8:30 am – 6:00 pm
5. Riders are picked up at their homes for trips to medical and personal appointments, Next activities and shopping destination. The vans typically travel within a four mile radius from Next.
6. Assistance to and from the van or help carrying packages is available. Personal assistance within the home is not provided. Drivers are not permitted to enter the home or do any lifting. Wheelchair riders may find it helpful to have an escort.
7. Assistance with carrying packages is limited to five (5) packages.
8. All destinations must be scheduled in advance. Drivers are not permitted to make non-scheduled stops.
9. Riders should be ready and waiting in the designated pickup location at least 15-minutes before the scheduled pick up time.
10. Notify Next as soon as possible to cancel a trip.
11. Riders can schedule only one (1) ride per day and three (3) trips per week

Violations of these rules may result in (a) verbal or written reprimand; (b) temporary or permanent loss of Center privileges; or (c) such other steps deemed necessary by Next under the circumstances.

**NEXT GIFT ACCEPTANCE AND ALLOCATION POLICY**

1. Purpose:

The purpose of this policy is to provide guidelines for prospective donors and their advisors and for the acceptance and allocation of gifts to Next or the Endowment Fund (“Fund”) of Next.

1. Scope:

The policy adopted by the Board, in consultation with the Finance Committee, shall apply to those gifts that are made to Next by or through lifetime gifts and transfer of property such as cash, stocks, bonds, municipal bonds, tangible assets and real estate, bequests in wills, transfers in charitable or other trusts, charitable gift annuities, and assignments of life insurance.

1. Gift Acceptance:

A gift to Next shall be accepted only after approval by the Board in consultation with the Finance Committee. No individual shall speak on behalf of the Board concerning gift acceptance until action has been completed by the Board. No individual’s assurances of acceptance shall bind the Board to accept a gift that the Board would otherwise reject or seek to have modified. The following provision shall serve as a guideline for the acceptance of gifts. All gifts shall be transferred to the appropriate account(s) designated by the Board or the donor, as the case may be, as promptly as possible after receipt by Next.

* 1. Transfers by Check:

1. All gifts by check shall be accepted by Next regardless of the amount.
2. Checks shall be made payable to Next. In no event shall a check be made payable to an individual who represents Next in any capacity.

3.2 Publicly Traded Securities:

1. Readily marketable securities, such as those traded on a stock exchange, may be accepted by the Board.
2. For gift crediting and accounting purpose, the value of a gift of securities shall be the average of the high and low market prices on the date of the gift.
3. A gift of securities shall be liquidated as promptly as possible, and always within thirty (30) days of acceptance, unless the Board, in consultation with the Finance committee, determines that the securities shall be retained as an investment.

3.3Closely Held Securities:

1. Non-publicly traded securities may be accepted on a case by case basis by the Board in consultation with the Finance committee.
2. Prior to the acceptance, the Board and Finance Committee will explore methods and timing of liquidation of the securities through redemption or sale. The Board and Finance Committee will try to determine:
3. An estimate of fair market value, with the assistance of professional advisors, when appropriate.
4. Any restrictions on transfer.
5. Whether and when a sale or an initial public offering might be anticipated.
6. Upon the sale of non-publicly traded securities, the proceeds shall be promptly transferred to the appropriate account.
7. No commitment for repurchase by the donor of non-publicly traded securities shall be made prior to the completion of the gift of the securities.

3.4 Real Estate:

1. Any proposed gift of real estate must be reviewed by the Board in consultation with the Finance Committee. Factors to be considered are:
2. Maintenance costs
3. Real estate taxes
4. Insurance
5. Real estate broker’s commission and other costs of sale
6. Appraisal costs
7. Potential Contingent Liabilities (Environmental for example: See C below)
8. The donor normally shall be responsible for obtaining an appraisal of the property.
9. Next reserves the right to require an environmental assessment of any potential real estate gift to be performed at the donor’s expense.
10. If the gift of property is accepted, title must be transferred to Next prior to the solicitation of any offer or contract for purchase. All real property received by gift shall be placed on the market as soon as practicable for conversion to cash, unless the Board, in consultation with the Finance Committee determines that the property shall be retained. The proceeds of the sale shall be promptly transferred to the appropriate account.

E. For gift crediting and accounting purposes, the value of the gift is the market value of the real estate at the time the gift is completed.

3.5 Life Insurance:

1. A Proposed gift of a life insurance policy for the Endowment Fund must be referred to the Board and Finance Committee for Review.
2. The Board will accept a life insurance policy as a gift only if Next is named as the owner and beneficiary of 100% of the policy.
3. If the gift is a paid-up policy, the value of the gift for crediting and accounting purposes is the policy’s replacement cost.
4. If the policy is partially paid-up, the value of the gift for crediting and accounting purposes is the policy’s cash surrender value. (Note: For IRS purposes, the donor’s charitable income tax deduction is equal to the interpolated terminal reserve, which is an amount usually slightly in excess of cash surrender value.)

3.6Tangible Personal Property:

1. A gift of jewelry, furniture, artwork, collections, or equipment shall be appraised for the value to be realized by Next.
2. Depending upon the anticipated value of the gift, a qualified independent appraiser may be asked to determine value, at the donor’s expense.
3. Next shall adhere to all IRS requirements relating to disposing of gifts of tangible personal property and will provide appropriate forms to the donor and IRS.

3.7 Deferred Gifts:

1. Next encourages deferred gifts through any of a variety of vehicles.
2. Charitable gift annuity (or deferred gift annuity)
3. Pooled income fund
4. Charitable remainder trust
5. Charitable lead trust
6. Bequest
7. Retained life estate
8. Next shall not act as a personal representative for donor’s estate.
9. Next shall not act as trustee or co-trustee on a charitable remainder trust.
10. Donors may be provided with planned gift illustrations or form documents without charge. The following disclaimer should be included in any planned gift related documents, materials, illustrations, letter or other correspondence:

We strongly urge that you consult with your attorney, financial and/or tax advisor to review and approve this complimentary information. This information in no way constitutes advice. We will gladly work with your independent advisors to assist in any way that we are able.

1. Next may seek qualified professional counsel in the exploration and execution of all planned gift agreements. Next recognizes the right of fair and just remuneration for such professional services.

4.0 Restricted Gifts:

Gifts of restricted funds may be accepted by Next and they shall be transferred to the specific Restricted Funds Account of the Endowment Fund. Donors of restricted gifts shall be encouraged to make provision in the gift documents so that gifts may be re-classified in the event of changed circumstances to conform to the needs of Next as determined by the Board in consultation with the Finance Committee.

5.0Confidentiality:

All information obtained from or about donors or prospective donors shall be held in the strictest confidence by all representatives of Next and all of its staff and volunteers. Either the name, the amount, or the conditions of any gift shall be published without the express written or oral approval of the donor and in the case of a deferred gift, the beneficiary thereof.

6.0Rejection of Gifts:

The Board, in consultation with the Finance Committee reserves the right to decline to accept any gift that does not further the mission or goals of Next.

7.0Records of Gifts and Acknowledgment:

Complete records of all gifts shall be maintained by Next for a minimum period of 5 years. All accepted gifts shall be gratefully acknowledged on behalf of Next.

8.0Amendments to Policy:

Any member of Next may propose amendments to this policy. Such proposed amendments shall be made in writing and submitted to the Board and the Finance Committee prior to any meeting called to discuss the proposed amendments. Proposed amendments to this policy may be adopted by a majority vote of the Board after recommendation by a majority vote of the entire Finance Committee.

Adopted: April 16, 2013

**MEMBER/NON-MEMBER PARTICIPATION AND FEE POLICY**

Member Definition:

A member is a person who has paid Next Membership dues.

Membership commences with the payment of dues.

Payment to the Next office is made in person, by phone or online. Completion of a membership form is required. The form includes contact and emergency information.

Nonresident Participation in Classes, Travel and Events:

Non-member participation is allowed in many classes, travel and events with priority given to members.

A non-member fee is typically charged with the amount varying depending on the cost of the class, trip or activity.